King County

Exhibit B: Proposer Response Template

This PDF version is for guide purposes only. Use the Microsoft Office Word version for completing this section, download from, http://www.metrokc.gov/procurement/rfpdocs/2005/October/GoodsAndServices/05-128/05-128_Exhibit_B.doc

SECTION 1 - Auto-Discovery and Asset Management RFP Response Form

Unless otherwise stated, responses to all questions in Exhibit B must be submitted in a Microsoft Word 2000 or 2002/XP format. When questions are asked in a non-table format, provide your response directly after the question. If page limits are provided, the text of the question asked counts towards the stated page limit.

Management Section

1-1   Vendor Contact Information and Experience

1-1   Vendor Contact Information

1.1.1	Company Name	
1.1.2	Street Address	
1.1.3	City, State Zip Code	
1.1.4	Name of Primary Contact	
1.1.5	Phone Number of Primary Contact	
1.1.6	E-mail of Primary Contact	

1.2   Recent Experience

#	Question	Response
1.2.1	How many asset management and auto-discovery solutions has your company implemented in the past 24 months?	
1.2.2.a	How many of these installations have been for public-sector clients?	
1.2.2.b	How many of these installations have used a Microsoft SQL Server database?	
1.2.2.c	How many of these installations have used an Oracle database?	
1.2.2.d	How many of these installations have used an alternative database. Please identify the database(s) used.	

1.3   Existing Installations of Asset Management and Related Software Within King County

#	Question	Yes/No	Comments
1.3.1.a	Is any portion of your recommended solution currently being used by other King County agencies?		
1.3.1.b	If so, please list the products being used in the table at the end of this section.		
1.3.1.c	If so, may ITS contact a representative from this agency to discuss how the agency is using the product?		
1.3.2.a	Does your company currently have other (not auto-discovery/asset management) relevant IT asset life-cycle management and/or equipment monitoring products installed with either ITS or other King County agencies?		
1.3.2.b	If so, please list the products being used in the table at the end of this section.		

1.3.3   Table for Responding to Questions 1.3.1.b and 1.3.2.b

Product Name and Version	Purpose of Product	King County Agency(ies) Where Product Is Installed

Proposers may provide add additional rows if necessary.

1.4 Examples of Prior Installations

Provide three examples of prior installations *that are similar to our environment.* This question is being asked to gain a greater understanding of the types of customers currently using your auto-discovery and asset management product. ITS will not contact customers identified in this portion of the RFP during the Stage One evaluation (unless the contact is the same as in the response to question 1.3.1 c).

During the Stage Two portion of the evaluation, ITS will ask vendors to provide two customer references. These references may be the same as or different from the ones provided below.

EXAMPLE ONE

1.4.a	Customer Name	
1.4.b	Industry: public sector (state, county, city); private sector (insurance, banking, etc.)	
1.4.c	Hardware configuration	
1.4.d	Applications installed (name and version)	
1.4.e	Approximate number of pieces of equipment being tracked	
1.4.f	Approximate number of system administrators*	
	Approximate number of system engineers**	
1.4.g	Approximate number of end-users***	
1.4.h	Dates and releases installed	
1.4.i	Modifications made	

* A system administrator is an individual within the customer's organization who manages the AD/AM system.

** A system engineer is an individual within the customer's organization who manages the hardware and OS where the AD/AM resides.

*** An end-user is an individual within the customer's organization who accesses, edits, queries, etc. the data in the asset management repository and/or provides updates to the data within the database (mass updates relating to a financial code, etc.).

EXAMPLE TWO

1.4.a	Customer Name	
1.4.b	Industry: public sector (state, county, city); private sector (insurance, banking, etc.)	
1.4.c	Hardware configuration	
1.4.d	Applications installed (name and version)	
1.4.e	Approximate number of pieces of equipment being tracked	
1.4.f	Approximate number of system administrators*	
	Approximate number of system engineers**	
1.4.g	Approximate number of end-users***	
1.4.h	Dates and releases installed	
1.4.i	Modifications made	

* A system administrator is an individual within the customer's organization who manages the AD/AM system.

** A system engineer is an individual within the customer's organization who manages the hardware and OS where the AD/AM resides.

*** An end-user is an individual within the customer's organization who accesses, edits, queries, etc. the data in the asset management repository and/or provides updates to the data within the database (mass updates relating to a financial code, etc.).

EXAMPLE THREE

1.4.a	Customer Name	
1.4.b	Industry: public sector (state, county, city); private sector (insurance, banking, etc.)	
1.4.c	Hardware configuration	
1.4.d	Applications installed (name and version)	
1.4.e	Approximate number of pieces of equipment being tracked	
1.4.f	Approximate number of system administrators*	
	Approximate number of system engineers**	
1.4.g	Approximate number of end-users***	
1.4.h	Dates and releases installed	
1.4.i	Modifications made	

* A system administrator is an individual within the customer's organization who manages the AD/AM system.

** A system engineer is an individual within the customer's organization who manages the hardware and OS where the AD/AM resides.

*** An end-user is an individual within the customer's organization who accesses, edits, queries, etc. the data in the asset management repository and/or provides updates to the data within the database (mass updates relating to a financial code, etc.).

1.5 Project Resources

In the tables below, list up to five individuals your company plans on allocating to this project. At a minimum identify the selected vendor's Project Manager, Sponsor, and two individuals available for technical support.

<u>Vendor Team Member #1</u>

Name:	
Role on Project:	Project Manager
Ability to work on-site:	
Years working with auto-discovery and asset management implementations:	
Experience:	
Skills:	

<u>Vendor Team Member #2</u>

Name:	
Role on Project:	Sponsor
Ability to work on-site:	
Years working with auto-discovery and asset management implementations:	
Experience:	
Skills:	

<u>Vendor Team Member #3</u>

Name:	
Role on Project:	Technical Team
Ability to work on-site:	
Years working with auto-discovery and asset management implementations:	
Experience:	
Skills:	

Vendor Team Member #4

Name:	
Role on Project:	Technical Team
Ability to work on-site:	
Years working with auto-discovery and asset management implementations:	
Experience:	
Skills:	

Vendor Team Member #5

Name:	
Role on Project:	
Ability to work on-site:	
Years working with auto-discovery and asset management implementations:	
Experience:	
Skills:	

1.6   Additional Management/Financial Questions

#	Question	Response
1.6.1	What is the legal status of your company?	
1.6.2	What percentage of company revenue is dedicated to product research and development?	

Technical Section

2.0   RECOMMENDED SOLUTION

2.1   Recommended Solution

2.1.1   Present the application solution(s) that you are recommending in this RFP.

	Software Name	Version	Approximate Date of Next Major Release
Auto-Discovery			
Asset Management			

Additional Notes/Comments:

2.1.2   List protocols used to identify the following equipment types.

Equipment Type	Protocol(s) Used	Additional Comments
Cisco Network Equipment		
Marconi Network Equipment		
Server with Microsoft 2003 Server OS		
Server with UNIX OS		
Server with Red Hat Linux OS		
Desktop with Microsoft XP or 2003 OS		
Desktop with older versions of Microsoft OS (NT, 2000, 95)		
Desktop with Apple OS		

2.1.3 In one page or less (including the text of this question), demonstrate how your tool is capable of being accessed by a variety of users simultaneously. Explain how access can be limited for each user to ensure that the end user is only capable of viewing equipment being managed by the end user.

2.1.4 In one page or less (including the text of this question), demonstrate how your solution is a mature, market-tested solution that is robust enough to support long-term growth and expansion (larger # of equipment being tracked; larger # of end users accessing the data).

2.1.5 In one page or less (including the text of this question), explain how your solution is positioned to become a single source of accuracy for tracking IT equipment that can then be used in other aspects of an overall IT asset life cycle solution (i.e. linking to trouble tickets, etc.).

2.1.6 In three pages or less (including the text of this question), explain how your solution is positioned to integrate with specific enterprise-wide personnel and financial systems that King County either has in place currently or is considering implementing in the future. Please be sure to address your solution's ability to interact with each of the following applications:

- People Soft® version 8.0 (on Oracle® database 8i): King County currently uses this application for HR and payroll functions.

- People Soft ® version 8.9 (on Oracle ® database 10g): King County is planning to upgrade to People Soft version 8.9 (on Oracle Database 10g). This upgrade is tentatively scheduled for 2006, with some possible carryover into early 2007.

- Data Design Associates Fixed Assets: King County currently uses this mainframe based fixed assets program.

- Oracle Financials ®: King County currently uses a number of Oracle Financials® modules. Which, if any, Oracle Financial® modules does your recommended solution integrate with?

2.1.7 In one page or less (including the text of this question), present a high-level backup and disaster recovery strategy that will ensure the safe-keeping of the information stored within the information repository.

2.1.8 In two pages or less (including the text of this question), describe the knowledge transfer and documentation that will be provided by the Contractor to ensure sufficient information to allow the recommended solution to be managed entirely by internal staff.

2.1.9 The installation of an auto-discovery and asset management solution presents the Department of Executive Services with an opportunity to update and revise existing asset management policies and procedures. In order to learn and apply best practices, the King County Project Manager and Project Team are interested in learning about best practices as observed by experiences experts on the Selected Vendors Technical Team. In one page or less, (including the text of this question), please indicate if you, the Proposer, are willing to pass along industry "best practices" and/or "lessons learned". Identify which portions of the project are most suitable for this type of information sharing.

2.1.10 In one page or less (including the text of this question), provide additional relevant information demonstrating the fact that your tool works well in a complex environment such as King County's.

2-2   Technical Overview/Systems Architecture

2.2.1   Please list all hardware/software required to support your recommended solution in the following two scenarios (minimum requirement and maximum requirement). Clearly identify which requirements are to be provided by ITS rather than by the vendor.

The Minimum Requirement scenario represents a best estimate of the amount of equipment and number of users that will be using the solution with the Department of Executive Services. The Maximum Requirement scenario represents potential growth of the product over several years, as the product becomes available for use by other County agencies.

In anticipation of future growth of the recommended solution, it is highly likely that ITS will wish to obtain hardware to accommodate the maximum growth scenario.

If the selected vendor omits any critical component(s) required to run its recommended solution within either scenario, the vendor may be required to purchase the additional component(s) on behalf of ITS and King County.

	Provided By (Vendor/ITS)	Minimum Requirement (approximately 3,000 pieces of discoverable equipment and 20 users)	Maximum Requirements (approximately 20,000 pieces of equipment and 180 users)
Hardware			
Platform			
Disk Space			
Memory			
Processor			
Processor Speed			
OS			
Software			
Client Browser			
Web server software			
Web reporting tools			

2.2.2 In one page or less (including the text of this question), provide any additional information regarding the hardware/software required to support your recommended solution. (This is an optional question.)

2.2.3 In two pages or less (including the text of this question), provide a description and/or diagram of the equipment required to run your recommended solution. Explain how the pieces of equipment relate to each other.

2.2.4 In one page or less (including the text of this question), describe how the data captured from the auto-discovery tool will populate the central asset management database.

#	Question	Response
2.2.5	Identify any software dependencies required to use your product (operating system, java version, etc.).	
2.2.6	Identify any known incompatibilities with McAfee Spy-ware® version 1.0	
2.2.7	Identify any known incompatibilities with McAfee Firewall ® version 8.5.	
2.2.8	Identify any known incompatibilities with McAfee E Policy Orchestrator ® version 3.5.	
2.2.9	Identify any known incompatibilities with the agents used by your solution.	

3.0   AUTO-DISCOVERY

3.1   Approach to Discovery

#	Feature Description	Response
3.1.1	Can your auto-discovery solution be directed to run on specific networks and/or sub-nets? If so, how?	
3.1.2	Does your auto discovery solution have the capability to schedule automatic and manual run times?	
3.1.3	Can your auto discovery solution be configured to run continuously using a specified amount of bandwidth (i.e. less than full)? If so, how?	
3.1.4	Does your product have the capability to use agent-less and agent-based auto-discovery methods?	
3.1.5	What protocol(s) is/are used by your discovery tool?	
3.1.6	If your product uses multiple protocols, please explain how the multiple protocols are used and if all protocols are available for use "out of the box".	
3.1.7	If your product uses agents, list all agents required to be installed on desktops/laptops to make the auto-discovery solution fully functional.	
3.1.8	If an agent is used for desktops, explain a. How it is deployed, b. What port(s) it uses, c. What information it tracks, and d. How it communicates with the asset management database.	
3.1.9	If an agent is used for laptops, explain a. How it is deployed, b. What port(s) it uses, c. What information it tracks, and d. How it communicates with the asset management database.	
3.1.10	If an agent is deployed on a laptop and the laptop is being used outside of the network, how does the agent handle the situation? Does the agent attempt to send data or does the agent know that the data cannot be received?	

#	Feature Description	Response
3.1.11	Describe how your auto-discovery tool captures information from equipment logging on using a VPN connection (desktop, laptop, PDA).	
3.1.12	Is your auto-discovery tool capable of reporting when unidentifiable equipment logs onto the network using a VPN connection (desktop, laptop, PDA).	
3.1.13	List all agents required to be installed on servers to make the auto-discovery solution fully functional.	
3.1.14	If an agent is used for servers, explain a. How it is deployed, b. What port(s) it uses, c. What information it tracks, and d. How it communicates with the asset management database.	
3.1.15	List any/all device configuration(s) the auto-discovery software requires on network equipment (routers and switches) to make the application fully functional.	
3.1.16	Can your product detect unused Ethernet ports on Cisco switches? If so, how?	
3.1.17	If your product uses port scanning, how do you configure the product to ensure that Network Intrusion Detection Systems (NIDS) and Host Intrusion Detection Systems (HIDS) does not interpret your application as an intrusion?	
3.1.18	To what extent is your auto-discovery tool able to discover equipment located behind a firewall?	
3.1.19	What sort of initial band-width utilization should ITS expect during the initial discover phase(s) for a. 500 pieces of equipment? b. 1000 pieces of equipment? c. 3000 pieces of equipment?	
3.1.20	What sort of band-width utilization should ITS expect during on-going operation of the auto-discovery tool for: a. 1,500 pieces of equipment? b. 5,000 pieces of equipment? c. 10,000 pieces of equipment? d. 20,000 pieces of equipment?	

#	Feature Description	Response
3.1.21	Does your tool rely on hardware and software recognition lists? If so, how often and how are these recognition lists updated?	
3.1.22	Is the auto-discovery application required to run on a domain controller? A member-server? Other?	
3.1.23	What Active Directory permissions are required to install/use your auto-discovery software? (Enterprise, Admin, User, Etc.)	
3.1.24	If your product changes or extends the Active Directory schema, describe in detail what the changes are, when they need to occur, and how much time is required to complete them.	
3.1.25	Does your auto-discovery software require an Active Directory service account? If so, what permissions are required?	
3.1.26	If your product accesses Active Directory (AD) databases, describe what information is captured from the AD databases. Please state what assumptions are made regarding the data in the AD databases.	
3.1.27	Can your tool successfully identify equipment located within a Novell subnet?	
3.1.28	Describe any additional steps required to install your tool on equipment located within a Novell subnet.	
3.1.29	Provide an estimated number of current customer sites where your solution is deployed within an environment that contains Novell subnets. Are these customers using e-directory?	
3.1.30	Describe the level of accuracy in auto-discovery experienced by the typical customer of your product in an environment such as the one described in this RFP.	

3-2   Discovery: Hardware Equipment

#	Feature Description	How Meets Requirement (specify one): • Out of Box • Configurable/Modifiable • 3rd-Party Solution	Comments
Is your auto-discovery solution capable of discovering each of the following types of network attached devices?			
3.2.1	Desktops w/ Windows OS		
3.2.2	Desktops w/ Apple OS		
3.2.3	Laptops running a Windows OS		
3.2.4	Laptops running an Apple OS		
3.2.5	Servers w/ Microsoft OS		
3.2.6	Servers w/ UNIX OS		
3.2.7	Servers w/ Linux Red Hat OS		
3.2.8	Servers w/ Multiple Partitioned OS systems		
3.2.9	Disk arrays with virtual machine software installed?		
3.2.10	Cisco routers		
3.2.11	Cisco switches		
3.2.12	Marconi/Fore Systems ATM switches		
3.2.13	Multiple devices connected to a switched network port		
3.2.14	Dell switches		
3.2.15	Marconi ViPR equipment		
3.2.16	Linux Red Hat Servers providing SIP for Marconi ViPRs		
3.2.17	Telephony SIP servers		
3.2.18	Cisco Wireless Access Points		
3.2.19	Local attached printers		
3.2.20	PDAs		
3.2.21	Blackberry PDAs		
3.2.22	Other locally attached devices (plotters, scanners, faxes etc.)		
3.2.23	Equipment installed in a Novel environment with E-Directory?		
3.2.24	Equipment installed in a Novel environment without E-Directory?		
3.2.25	VOIP SIP Phones?		

#	Feature Description	How Meets Requirement (specify one): • Out of Box • Configurable/Modifiable • 3rd-Party Solution	Comments
3.2.26	VOIP Cisco Proprietary Phones?		

3-3 Discovery: Attributes of Hardware

#	Feature Description	How Meets Requirement (specify one): • Out of Box • Configurable/Modifiable • 3rd-Party Solution	Comments
Is your auto-discovery solution capable of discovering the following information about equipment attached to the network:			
3.3.1	Assigned Device Name (name assigned to the device)		
3.3.2	IP address		
3.3.3	DNS name		
3.3.4	BIOS data		
3.3.5	Log-on ID		
3.3.6	Assigned Asset Tag Number (in computer description field, SNMP configuration, possibly other log-in script)		
3.3.7	Machine manufacturer		
3.3.8	Machine model		
3.3.9	Machine serial number		
3.3.10	CPU attributes		
3.3.11	Hard drive partitions		
3.3.12	RAM installed (when applicable)		
3.3.13	RAM slots when applicable (e.g. position of installed, # available)		
3.3.14	Installed cards when applicable (e.g. card name, serial #, firmware version)		
3.3.15	Chassis Intrusion Detection devices		
3.3.16	Dell service code (if/when applicable)		

Additional Questions

#	Question	Response
3.3.17	Is your auto-discovery solution capable of discovering multiple IP addresses for a single piece of equipment? If so, in the comments section, please explain how the multiple addresses are distinguished.	
3.3.18	Is your auto-discovery solution capable of discovering multiple names for a single piece of equipment? If so, in the comments section, please explain how the multiple names are distinguished.	
3.3.19	Occasionally, the IP address of a particular device changes several times in a short period of time. Is your auto-discovery solution capable of capturing these changes?	

3.4   Discovery: Discovering Attributes of Software Installed on Equipment

#	Feature Description		
Does your auto-discovery product discover the following attributes of software installed on equipment?						

	Software Attribute	Desktop	Unix Server	Windows Server	Network-Cisco	Network-Marconi
3.4.1	OS and Version					
3.4.2	Service packs and maintenance releases loaded					
3.4.3	Application Manufacturer					
3.4.4	Application name					
3.4.5	Application Version(s)					
3.4.6	Entire directory/path of the location of the executable file discovered					

Additional Questions

#	Question	Response
3.4.7	Please list all Microsoft desktop operating systems (Microsoft 2000, XP, 2003, etc.) that your auto-discovery product is capable of detecting.	
3.4.8	Please list all Apple computer desktop operating system versions that your auto-discovery product is capable of detecting.	
3.4.9	Please list all server operating system types and versions that your auto-discovery product is capable of detecting.	

3.5   Discovery: Tracking Software/Printer Usage

#	Feature Description	How Meets Requirement (specify one): • Out of Box • Configurable/Modifiable • 3rd-Party Solution	Comments
3.5.1	Is your product capable of tracking software usage for all executables installed on a desktop? If not, which executables are capable of being tracked?		
3.5.2	Is your product capable of tracking software usage for hidden executables?		

Additional Questions

#	Question	Response
3.5.3	If your product tracks software usage, how is software usage calculated?	
3.5.4	Describe the impact that tracking software usage has on network bandwidth.	
3.5.5	Describe the impact that tracking software usage has on the performance of the local computer.	
3.5.6	Can the product track the number of duty cycles or print pages? Can this be a historical audit trail?	

4.0 ASSET MANAGEMENT DATABASE/REPOSITORY

4.1 Screen Layout/Data Fields

#	Feature Description	How Meets Requirement (specify one): • Out of Box • Configurable/Modifiable • 3rd-Party Solution	Comments
Does your application have the following asset attribute data fields? (If your data base uses a different name for the same information please list this in the comments section. If your data base requires this field to be added, please list this in the comments section.)			
4.1.1	Assigned Asset Name (name assigned to the device)		
4.1.2	Asset Criticality		
4.1.3	Assigned Asset Tag Number		
4.1.4	Equipment Type		
4.1.5	Equipment Sub-Type		
4.1.6	Manufacturer		
4.1.7	Model		
4.1.8	Serial Number		
4.1.9	Asset Identifier (when asset tag or serial number are not unique)		
4.1.10	Description		
4.1.11	Comment field		
4.1.12	Security classification		
4.1.13	IP address/Node		
4.1.14	Alias (2nd IP address)		
4.1.15	DNS name		
4.1.16	CPU		
4.1.17	CPU speed		
4.1.18	Hard drive partitions		
4.1.19	RAM installed (when applicable)		
4.1.20	BIOS data fields (when applicable)		
4.1.21	Chassis ID		
4.1.22	Dell Service Code (when applicable)		
4.1.23	RAM slots (when applicable)		
4.1.24	Service packs and maintenance releases loaded		

#	Feature Description	How Meets Requirement (specify one): • Out of Box • Configurable/Modifiable • 3rd-Party Solution	Comments
4.1.25	Installed cards (when applicable) If installed cards can be tracked, is there a limit to the number?		
4.1.26	Status field (i.e. to help track if the equipment has been received but not yet configured; configured but not yet deployed; deployed; taken out of service for repair, etc.)		
4.1.27	Installed Operating System and Version		
4.1.28	Software Application name(s) installed on machine		
4.1.29	Software Application version(s) installed on machine		
4.1.30	Application Product Number		
4.1.31	Building		
4.1.32	Floor		
4.1.33	Room		
4.1.34	Jack #		
4.1.35	Location #		
4.1.36	End-user last name		
4.1.37	End-user first name		
4.1.38	Date acquired		
4.1.39	Acquisition type (purchase/lease)		
4.1.40	Cost		
4.1.41	Invoice #		
4.1.42	Contract # Associated with this piece of equipment (when applicable)		
4.1.43	Software License agreement associated with software installed on a particular piece of equipment (when applicable)		
4.1.44	User defined financial field #1 (must be 9 digits)		
4.1.45	User defined financial field #2 (must be 4 digits)		
4.1.46	User defined financial field #3 (must be 6 digits)		
4.1.47	User defined financial field #4 (must be 3 digits)		
4.1.48	User defined financial planning field		

#	Feature Description	How Meets Requirement (specify one): • Out of Box • Configurable/Modifiable • 3rd-Party Solution	Comments
4.1.49	Disposal date		
4.1.50	Disposal reason (i.e. end of life, theft, loss, etc.)		
4.1.51	Log-on ID		
4.1.52	Building Street Address		
4.1.53	Building Address City, State, Zip		
4.1.54	Custodian of equipment		
4.1.55	User defined special requirements field		
4.1.56	User defined field to link equipment with a planned upgrade (i.e. flag this piece of equipment, it will be replaced next year as part of the XXX project)		

Additional Questions

#	Question	Response
4.1.57	Some equipment types, such as a laptop, have different equipment tracking needs than other equipment types, such as a router. Does your asset management database track different hardware attributes based on the type of equipment being tracked?	
4.1.58	How does your asset management database track multiple values for the same attribute? (Example: a disk array with virtual machine software on it that has multiple DNS names all pointing to the same piece of equipment)?	
4.1.59	Can an unlimited # of fields be added to the database?	
4.1.60	Can an unlimited amount of text entered into the comment field?	
4.1.61	Can the layout of the screens be personalized?	

4-2   Data Accepting, Updating, Reconciling, and Retiring

#	Feature Description	How Meets Requirement (specify one): • Out of Box • Configurable/Modifiable • 3rd-Party Solution	Comments
4.2.1	Does your application accept manual entries of asset data?		

#	Feature Description	How Meets Requirement (specify one): • Out of Box • Configurable/Modifiable • 3rd-Party Solution	Comments
4.2.2	Is your product capable of mass updates?		
4.2.3	Can your product accept batches of new records by uploading data from Excel? (example: add data regarding 10 new racks by uploading from an excel table rather than entering each record individually?)		
4.2.4	Is it possible to provide pointers or to attach relevant documents within your product (e.g. floor plans)?		
4.2.5	Does your asset management software allow the user to review inventory data from the auto-discovery tool with existing data before accepting it into the database?		

Additional Questions

#	Question	Response
4.2.6	Does your application accept data from bar code readers? If so, which bar code readers are supported "out of the box"?	
4.2.7	Does your application accept or plan on accepting data using RFID technology? If this is something being planned, please state in the comments section approximately when you plan on releasing this capability.	
4.2.8	Are all equipment records kept in the database permanently? If records are purged, how do you address concerns about an audit trail?	
4.2.9	What permissions are required for an end-user to be able to add/edit/retire a record in the database?	
4.2.10	Are end-users allowed to "override" data stored in the database that comes from the auto-discovery tool?	

4-3   Querying, Reporting, and Extracting

#	Feature Description	How Meets Requirement (specify one): • Out of Box • Configurable/Modifiable • 3rd-Party Solution	Comments
4.3.1	Can your product query every data element in the database?		

#	Feature Description	How Meets Requirement (specify one): • Out of Box • Configurable/Modifiable • 3rd-Party Solution	Comments
4.3.2	Can your product export requested data into Excel?		
4.3.3	Can your product create custom reports without an additional software product or module?		
4.3.4	Is your product capable of dynamic queries where values for more than one data field are requested simultaneously?		
4.3.5	Can custom reports be specified, saved, and rerun in the future?		
4.3.6	Can reports be scheduled to run automatically at predetermined times?		
4.3.7	Can your product automatically send reports via e-mail distribution through Outlook/Exchange?		
4.3.8	Can your product generate a report that forecasts asset upgrade requirements (equipment replacement forecasts)?		
4.3.9	Can your product create reports showing differences in inventory (six months ago, current) based on specified components?		
4.3.10	Can your product list/report equipment that is in the database from prior discovery scans that is currently not detected on the network? That has not been observed on the network for the past 6 months? The past 12 months?		
4.3.11	Can your product export data to the following reporting tools: a. Crystal Reports b. Business Objects c. Oracle Reports		

Additional Questions

#	Feature Description	Response
4.3.12	Is your product's web reporting accessible via Internet Explorer?	
4.3.13	Does your web-based reporting feature allow end-users to view and print: a) Standard reports? b) Custom reports based on user-defined queries?	

#	Feature Description	Response
4.3.14	Does your product work with Microsoft SQL Reporting Services? If not, what does your web reporting component use/require? Is this product provided or required to be purchased separately?	
4.3.15	Please provide, at a high-level, additional relevant information regarding your solution's web reporting capabilities (features in addition to reporting and querying, etc.).	
4.3.16	How many pre-set reports does your product have?	
4.3.17	How does your system address equipment being retired? Are the records kept in the system? Are they purged? If they are purged, how do customers keep historical records of equipment (i.e. a piece of equipment is removed from the system because it is assumed to be sent to surplus but then re-enters the system 8 months later)?	
4.3.18	Does your system include the ability to record and report "cradle to grave" changes to an asset from the initial record to the current changes? If so, define what information about the configured asset is captured (date/time of change, person making change, etc.) and how it is reported.	
4.3.19	Is your solution able to identify the existence and state of devices connected to the network that are used by consultants while at the same time separating them from the County's inventory? If so, how?	
4.3.20	How is software usage reported? How accurate is the software usage data?	
4.3.21	Provide additional information that you feel is relevant to your reporting capabilities.	
4.3.22	Provide additional information that you feel is relevant to your web reporting capabilities.	

4-4   Associating Hardware and Software to Contracts and Service Agreements

#	Feature Description	How Meets Requirement (specify one): • Out of Box • Configurable/Modifiable • 3rd-Party Solution	Comments
4.4.1	Is your solution capable of tracking software usage for individual applications against individual software licenses? How? (Example: We have 100 Individual licenses for a particular version of Microsoft's Personal Productivity Suite. How can your tool aid staff in knowing how many copies of the application are currently installed on individual computers? Are only 85 currently installed? Are 92 currently installed?)		
4.4.2	Is your solution capable of tracking software usage for applications against concurrent software licenses? How? (Example: No more than five individuals can use Microsoft Project at the same time. Can your tool assist in ensuring that if a sixth person uses the application, that they not be able to access it until one of the other individuals has closed out.)		
4.4.3	Is your product capable of linking/assigning specific pieces of hardware to specific maintenance and/or support agreements? If so, how?		
4.4.4	Is your product capable of linking/assigning specific instances of software to specific license renewal agreements? If so, how?		
4.4.5	Is your product capable of forecasting maintenance/support agreements due for renewal? If so, is your product also capable of tracking the equipment affected by each agreement?		
4.4.6	Is your product capable of forecasting software agreements that are due for renewal? Identifying the software affected by the agreement, including which machines the software is installed on?		
4.4.7	Can your product track the number of seats associated with a particular product (i.e. research service)? Can your product track who is assigned to each license instance?		
4.4.8	Is your product capable of sending notice when a contract/license agreement is about to expire?		
4.4.9	Is your product capable of sending notice when software usage exceeds the allowable number of instances?		

Additional Question

#	Question	Response
4.4.10	Please describe, at a high-level, any additional features associated with software tracking that you feel ITS will benefit from knowing about your product.	

4.5   Integration

#	Feature Description	Response
Does your product have out-of-the box functionality to accept data directly from any of the following tools/applications? (In the comments section, please list the particular versions supported.)		
4.5.1	Your recommended auto-discovery tool?	
4.5.2	CiscoWorks LMS (LAN Management Solution) Bundle®	
4.5.3	HP Open View Network Node Manager®	
4.5.4	Marconi Service On Data ®	
4.5.5	Microsoft SMS®	
4.5.6	McAfee Foundstone Vulnerability Scanner®	
4.5.7	TrackIT 6.5 Enterprise Edition®	
4.5.8	Altiris Express Deployment Solution®	

#	Feature Description	Response
Does your product have out-of-the-box functionality for two-way data transfer with any of the following tools/applications?		
4.5.9	Front Range Heat ® version 7.0 (Call Log, iHEAT, Self Service, Business Process Automation, and Manager Console)	
4.5.10	Other help desk/trouble ticket applications?	
4.5.11	Peoplesoft® version 8.0 on Oracle® database 8.i?	
4.5.12	Peoplesoft® version 8.9 on Oracle® database 10.g?	
4.5.13	Oracle Financials ®? Which modules?	
4.5.14	Oracle Financials Fixed Asset Module®?	
4.5.15	Remote desktop management applications?	
4.5.16	Please list other systems (not mentioned above) that your solution is capable of integrating with "out of the box".	

Additional Questions

#	Question	Response
4.5.17	Will you provide published Application Programming Interfaces (APIs) to facilitate integration with other systems (human resources, help desk, desktop management, etc.)?	
4.5.18	If ITS chooses to build a data interface to another product in the future, how will the interface hold up when the selected product is upgraded? Will the same interface be compatible with the upgrade or will ITS need to build a new interface to work with the upgraded system?	
4.5.19	If your solution does not currently have out-of-the-box functionality to import/export data with Front Range Heat® version 7.0, provide an estimated cost and duration (in program hours) for how long it would take to build an interface for exchanging data with your product.	Price: Duration: Possible Additional Hardware (if any)
4.5.20	If your solution does not currently have out-of-the-box functionality to import/export data with Peoplesoft® version 8.0 on Oracle® database 8.i, provide an estimated cost and duration (in program hours) for how long it would take to build an interface for exchanging data with your product.	Price: Duration: Possible Additional Hardware (if any)
4.5.21	If your solution does not currently have out-of-the-box functionality to import/export data with Peoplesoft® version 8.9 on Oracle® database 10.g, provide an estimated cost and duration (in program hours) for how long it would take to build an interface for exchanging data with your product.	Price: Duration: Possible Additional Hardware (if any)
4.5.22	If your solution does not currently have out-of-the-box functionality to import/export data with the Oracle Financials Fixed Asset Module®, provide an estimated cost and duration (in program hours) for how long it would take to build an interface for exchanging data with your product.	Price: Duration: Possible Additional Hardware (if any)
4.5.23	As a future enhancement, ITS may choose to build a data interface to the mainframe based Data Design Associates Fixed Asset Program. Provide an estimated cost for labor and duration (in program hours) for how long it would take to build an interface for exchanging data with your product. Also list (at a high level) any additional hardware that may be required as part of the integration project.	Price: Duration: Possible Additional Hardware (if any)

4.6   Additional Questions Relating to Asset Management

#	Question	Response
4.6.1	Estimate the number of hours of manual data entry that are likely to be needed in an environment such as ours to initially populate the database.	
4.6.2	What permissions are required to run/manage the asset management solution? (Enterprise, Admin, User, etc.)	
4.6.3	Does the system include imbedded asset trouble ticket functionality? If so, please explain.	
Can an appropriately trained end-user perform the following functions within your recommended solution? (In your response, explain the level of training required):		
4.6.4	Add fields to the database?	
4.6.5	Customize fields within the database?	
4.6.6	Perform mass updates across assets?	
4.6.7	Is it possible for an individual with the appropriate settings to look at all equipment in the database, regardless of which agency the equipment is assigned?	

5.0 AUTO-DISCOVERY AND ASSET MANAGEMENT

This portion of the RFP includes additional questions relating to auto-discovery and/or asset management.

5-1 Security

#	Feature Description	Auto-Discovery Solution	Assist Management Solution
5.1.1	Do your products permit separation of assets on an agency/departmental basis, with restrictions from viewing/accessing/modifying between agencies/departments?	n/a	
5.1.2	Does your web based interface use HTTPS?	n/a	
5.1.3	Does your product allow for unique user names and passwords for all users? Describe any restrictions such as number of users, password length, password composition, etc.		
5.1.4	Does your product have the ability to terminate the access rights of an individual user? Automatically?		
5.1.5	Does your product provide for configuring role-based security for roles such as administrator, end-user, and manager? Describe any limitations of this role based security. Can users be members of multiple roles?		
5.1.6	Is an audit trail provided? Describe all items tracked in the audit trail.		
5.1.7	Does your product provide security at the database level? At the field level? Describe how this security is implemented.		
5.1.8	Does your product have a minimum 128-bit encryption? Is encryption at the database level, record level or field level? Describe the encryption algorithm(s) used.		

5-2 Support, Training, Releases

#	Question	Response
5.2.1	Does your company offer business day phone support from 8:00 am to 5:00 pm, PDT and PST?	
5.2.2	If you offer business day phone support, do you provide users with a toll-free number to access the support?	
5.2.3	Where is your customer support phone center located?	
5.2.4	Where are your primary development locations?	
5.2.5	Where are your primary technical support center locations?	
5.2.6	How often do you have major releases of your software products (auto discovery and asset management)?	
5.2.7	How often do you have minor releases of your software products (auto discover and asset management)?	
5.2.8	What versions of your solution are currently being supported?	
5.2.9	Are work-arounds documented and provided on an on-going basis?	
5.2.10	Are patches/service packs available to the customer free of charge? Describe how they are distributed.	

5.3 Licensing Structure/Annual Maintenance Questions

#	Question	Response
5.3.1	Define what constitutes a registered user.	
5.3.2	If applicable, define what constitutes a concurrent user.	
5.3.3	Are concurrent users based on named users or use of product?	
5.3.4	If named users are required for concurrent use licenses, is there a defined timeout period of inactivity that allows the concurrent license to be reassigned?	
5.3.5	Describe the process of transferring licenses?	
5.3.6	Describe how to purchase additional end-user licenses.	
5.3.7	If your solution requires licenses for agents, describe how to add/purchase additional agent licenses for use with tracking additional assets.	
5.3.8	Describe what licensing requirements are needed for users to use your solution's web feature to access the	

#	Question	Response
	asset management data (to run a report, query, etc.).	
5.3.9	Are individuals required to have a license in order to access web reports? If so, what type of license?	
5.3.10	Provide any additional information relevant to your company's licensing structure.	
5.3.11	Are all updates and all upgrades included as part of the annual software maintenance agreement without extra charges?	

5.4   Experience Required to Support

#	Question	Auto-Discovery Tool	Asset Management Database/ Repository	Asset Management Web Component
5.4.1	Describe the type of professional experience and training required to install your product.			
5.4.2	Describe the type of professional experience and training required to configure your product.			
5.4.3	Describe the type of professional experience required to operate your product.			

6.0 PROJECT PLAN

As Attachment 1 to Exhibit B, please provide a detailed project plan for each of the phases listed below. This project plan may be submitted as a Microsoft 2000 or 2002/XP format or Microsoft Project 2002 format.

Project Phase #	Project Phase Name
One	Project Kickoff/Project Planning for Installing Tool within ITS
Two	Design/Data Mapping of Asset Management Database/Repository
Three	Implementation of any identified changes to the design of the "out of the box" asset management database/repository.
Four	Installation of Asset Management Database/Repository (including data conversion and population)
Five A	Deploying Auto-Discovery Tool in Test Environment(s)
Five B	Testing Auto-Discovery Tool and Asset Management Database/Repository
Six A	Deployment of Auto-Discovery Tool in Operating/Production Environment
Six B	Implementation of Auto Discovery Tool and Asset Management System in Operating/Production Environment
Seven A	Project Planning for Deployment of auto-discovery and asset management tool within all other DES agencies/departments
Seven B	Deployment of auto-discovery and asset management tool within all other DES agencies/departments
Eight	Final Acceptance (including submittal of all requested documentation and sufficient knowledge transfer to allow internal staff to support the system)

A King County ITS project team will be established for the duration of this project. Members of the KC ITS team will include a dedicated project manager, individuals responsible for supporting the product, end-users, and technical specialists in particular areas (such as networks, active directory, etc.). The exact composition of this team will be established during the project kick-off and planning stage of the project.

ITS expects the chosen solution to be fully implemented within ITS four to six months after the contract has been signed and necessary equipment has been purchased. ITS expects implementation for DES Offices and Divisions to occur within four months of the ITS implementation.

For each individual task associated with the project plan, indicate the staffing resources provided by the vendor, the staffing resources the vendor expects to be provided by KC staff, and the approximate amount of time that will be required to complete individual tasks. Be sure to identify appropriate tasks in the project plan to address the following objectives:

- Sufficient knowledge transfer to ITS staff during installation of all products to allow ITS staff to support and troubleshoot all products after acceptance.

- Transferring existing asset management data from existing resources (SQL/Excel) into the Asset Management database.

- Thorough deployment of the auto-discovery tool, including any necessary follow-up associated with equipment configuration to ensure that the auto-discovery tool is collecting information correctly and accurately.

- Training end-users during the ITS implementation; training end-users during the DES implementation.

7.0 SCREEN SHOTS

7.1 Screen Shots

As Attachment 2, please provide a copy of all screen shots of the asset management database. Ensure that your electronic response is submitted in a Microsoft Word 2000 or 2002/XP format or as a .PDF file.

8-0 List of Pre-Set Reports

8.1 List of Pre-Set Reports

As Attachment 3, provide a list of pre-set reports that are available for customers to use as part of your "out of the box" solution. In addition to other comments that you may choose to provide, clearly identify all reports that assist with budgeting and forecasting tasks associated with equipment replacement planning. Ensure that your electronic response is submitted in a Microsoft Word 2000 or 2002/XP format. Submit your list using the following table format:

Table Name	Description	Additional Comments

9-0 Data Dictionary

9.1 Data Dictionary

Responding to section 9.1 is optional. As Attachment 4, list each field name and provide the field name's purpose, type, and length for each standard field that is part of the asset management data base. Ensure that your electronic response is submitted in a Microsoft Word 2000 or 2002/XP format. Submit your list using the following table format.

Field Name	Purpose of Field	Field Type (ex: alpha, numeric, alpha/numeric)and Length (ex: 3 characters; 15 characters; unlimited)

10.0 PRICING QUESTIONS

10.1 Pricing Tables: Software and Agent Device Licenses

PRICING TABLE 1

Item	List Price	KC Price (if different than list price)	Year 1 Maint	Year 2 Maint	Year 3 Maint	Year 4 Maint	Year 5 Maint	Other Costs	Comments/Purpose
10.1a. Software Applications/Licenses: List all applications (include version) to be purchased as part of your recommended solution. In the comment section, indicate the purpose of the application, the quantities of licenses being provided, and how many years into the future this particular version of the software is expected to be supported. If licensing types use different pricing structures, please list each license type separately. Add additional rows if necessary. Licensing costs must be presented for at least ten on-going users and ten intermittent users.									
Application: _____ License Type: _____ # of Licenses provided @ this price: ____ # of Licenses Vendor recommends KC purchase for use within DES: _____ Application will be supported through:____									

Application: _____ License Type: _____ # of Licenses provided @ this price: ____ # of Licenses Vendor recommends KC purchase for use within DES: _____ Application will be supported through:____									
Application: _____ License Type: _____ # of Licenses provided @ this price: ____ # of Licenses Vendor recommends KC purchase for use within DES: _____ Application will be supported through:____									

Pricing Table 2

Item	Qty	List Price	KC Price (if different than list price)	Year 1 Maint	Year 2 Maint	Year 3 Maint	Year 4 Maint	Year 5 Maint	Other Costs	Comments
10.1b Agents: If your product uses agents on end-user devices, list the cost for the quantity stated. If your company prices these devices based on volume, please indicate the next three price breaks by quantity and price in the comments section. Be sure to list any future year costs associated with these devices. If necessary, add additional rows to identify any additional types of agent licensing ITS will be required to purchase as part of your recommended solution.										
Desktop/ laptop	1600									Price Break #1 Cost/Device: @ Quantity: Price Break #2 Cost/Device: @ Quantity: Price Break #3 Cost/Device: @ Quantity:
Server – w/ agent	100									Price Break #1 Cost/Device: @ Quantity: Price Break #2 Cost/Device: @ Quantity: Price Break #3 Cost/Device: @ Quantity:

Item	Qty	List Price	KC Price (if different than list price)	Year 1 Maint	Year 2 Maint	Year 3 Maint	Year 4 Maint	Year 5 Maint	Other Costs	Comments
Server – w/o agent	100									Price Break #1 Cost/Device: @ Quantity: Price Break #2 Cost/Device: @ Quantity: Price Break #3 Cost/Device: @ Quantity:
Network Attached Device (printer, plotter, scanner, fax PDA, etc.)	300									Price Break #1 Cost/Device: @ Quantity: Price Break #2 Cost/Device: @ Quantity: Price Break #3 Cost/Device: @ Quantity:

				Year 1	Year 2	Year 3	Year 4	Year 5	Other	Comments
Item	Qty	List Price	KC Price (if different than list price)	Maint	Maint	Maint	Maint	Maint	Costs	
Server – w/o agent	100									Price Break #1 Cost/Device: @ Quantity: Price Break #2 Cost/Device: @ Quantity: Price Break #3 Cost/Device: @ Quantity:
Network Attached Device (printer, plotter, scanner, fax PDA, etc.)	300									Price Break #1 Cost/Device: @ Quantity: Price Break #2 Cost/Device: @ Quantity: Price Break #3 Cost/Device: @ Quantity:
Network Device (router, switch, wireless access point, etc)	850									Price Break #1 Cost/Device: @ Quantity: Price Break #2 Cost/Device: @ Quantity: Price Break #3
RFP 05-128 LM – Exhibit B			40							

10.2. Vendor Support and Training Costs During Installation

In the table below, please provide "not to exceed" costs for vendor support and training during each project phase listed below. *Section 6.0* requires vendors to submit a detailed project plan that provides details regarding the support provided during each phase.

Project Phase	Not to Exceed Cost, Including Support and Training
Phase One – Project Kickoff/Project Planning for Installing Tool within ITS	$
Phase Two – Design/Data Mapping of Asset Management Database/Repository	$
Phase Three – Installation of Asset Management Database/Repository (including data conversion and population)	$
Phase Four A – Deploying Auto-Discovery Tool in Test Environment(s)	$
Phase Four B – Testing Auto-Discovery Tool and Asset Management Database/Repository	$
Phase Five A – Deployment of Auto-Discovery Tool in Operating/Production Environment	$
Phase Five B – Implementation of Auto Discovery Tool and Asset Management System in Operating/Production Environment	$
Phase Six A – Project Planning for Deployment of auto-discovery and asset management tool within all other DES agencies/departments.	$
Phase Six B – Deployment of auto-discovery and asset management tool within all other DES agencies/departments.	$
Phase Seven – Final Acceptance	N/A
Combined Total of "Not to Exceed" Costs for Vendor Support and Training Costs During Installation	$

10-3   Other One-Time Costs

In the table below, please list any additional one-time costs associated with procuring your recommended solution. Items identified in Section 2.2.1 need not be included below.

#	Item	Cost
		$
	Combined Total of "Other One-Time Costs"	$

10-4   On-Going Training

ITS intends to offer annual, on-site end-user training for the recommended solution. ITS expects between ten and fifteen participants to attend an individual training. ITS will provide an appropriately sized training room. ITS envisions scheduling 1-3 trainings each year, with the option of scheduling more or fewer.

Please provide a cost per class. The cost must be inclusive of travel, lodging, and out-of-pocket living expenses and must be valid through 2008.

Cost per class: **$**_____

In the space below, provide a more detailed description of the training that will be conducted (how many hours, topics covered, # of individuals who can attend, etc.).

In the space below, please describe any additional training (off-site, etc.) and associated costs offered by your company.

10.5   Hourly Rates for Potential Future Expansion of Solution

In the table below, please provide the hourly rates charged for your specialized support. ITS may wish to use these services in developing interfaces with future systems, developing special customized reports after installation, etc. These hourly rates must be valid through 2008.

Staff Resource Category	Hourly Rate
	$
	$
	$
	$

Average Hourly Rate: $_____

10.6 Summary of Costs Identified in Sections 6.1 – 6.

Summary of Software and Vendor Costs

Section	Item	Combined Cost for Each Section
10.1.A	Software Applications Licenses	$
10.1.B	Agent Licenses	$
10.2	Sub-Total of "Not to Exceed Costs" for Vendor and Training Support (Phases 1 – 7)	$
10.3	Other One-Time Costs (if applicable)	$
10.4	Cost/Training Session	$
10.5	Average Hourly Rate	$
10.6	TOTAL of Above Listed Items	$

Attachment 1
Project Plan

As referenced in <u>Section 6.0 of Exhibit B</u>, please present a proposed project plan. The plan shall be based on the phases listed in <u>Section 6.0 of Exhibit B</u>. The project plan may be submitted in a Microsoft 200 or 2002/XP format or in a Microsoft Project 2002 format.

Attachment 2
Screen Shots

As referenced in <u>Section 7.0 of Exhibit B</u>, please provide a copy of all screen shots of the asset management database. Ensure that your electronic response is submitted in a Microsoft Word 2000 or 2002/XP format or as a .PDF file.

Attachment 3
List of Pre-Set Reports

As referenced in <u>Section 8.0 of Exhibit B</u>, provide a list of pre-set reports that are available for customers to use as part of your "out of the box" solution. In addition to other comments you may choose to provide, clearly identify all records that assist with budgeting and forecasting tasks associated with equipment replacement planning. Ensure that your electronic response is submitted in a Microsoft Word 2000 or 2002/XP format. Submit your list using the following table format:

Table Name	Description	Additional Comments

Attachment 4
Data Dictionary

Responding to this section is optional. As referenced in <u>Section 9.0 of Exhibit B</u>, for each standard field name in the asset management database, provide the field name's purpose, type, and length. Submit your list using the following table format:

Field Name	Purpose of Field	Field Type (ex: alpha, numeric, alpha/numeric)and Length (ex: 3 characters; 15 characters; unlimited)